

***This is only a **preview** of the exam statements for the Training & Experience Evaluation. You will be asked to respond to each statement indicating how your training and experience relate to each. **To take the actual exam**, please refer back to the bulletin and click the link at the bottom of the bulletin.

Training and Experience Evaluation

Investment Director

CalPERS

The California civil service selection system is merit-based and eligibility for appointment is established through a formal examination process. This examination consists of a Training and Experience evaluation used to evaluate your education, training and experience relevant to the position.

This Training and Experience evaluation is a scored component accounting for 100% of your rating in the examination process. It is important to complete the questionnaire carefully and accurately. Your responses are subject to verification before appointment to a position.

Number of Questions: 1 – 7

To answer all the test items in this exam, you will be required to choose from among the provided answers, and to enter (type in) specific information about your experience.

Be prepared to give specific information about the length and breadth of your work experience.

Instructions

Rate your experience performing specific job-related tasks.

Respond to each of the following statements by indicating how the statement applies to you. You are required to respond to every question and provide relevant examples.

In responding to each statement, you may refer to your WORK EXPERIENCE, whether paid or volunteer, and/or FORMAL TRAINING COURSES you have completed.

PLEASE NOTE: This examination is designed to gain an overall assessment of your experience as it directly relates to the duties and the knowledge, skills, and abilities

required for this position. All components of this examination have been carefully validated by tying them directly to job requirements and documenting their relevance to the position.

Tasks for Investment Director

1. Participating in the selection and supervision of external investment related vendors (e.g., external consultants, advisors, technology providers).
2. Monitoring investments, portfolio compliance, or operational risk in order to meet organizational objectives.
3. Analyzing a wide variety of investment risks, processes, and/or controls in order to meet the organization's investment objectives.
4. Developing or implementing new programs, strategies, policies, processes or systems with senior investment staff.
5. Analyzing reports including risk characteristics, historical performance, performance attribution, economic forecasts, and security analysis in order to meet organizational investment objectives.
6. Presenting investment reports to senior management/board using all available resources.
7. Supervising or leading subordinate staff performing investment duties.